

DOCUMENT RESUME

ED 089 405

80

EA 005 992

TITLE Needs Assessment in Education: A Planning Handbook for Districts. Handbook Series on Comprehensive Planning for Local Education Districts, No. 3.

INSTITUTION New Jersey State Dept. of Education, Trenton. Div. of Research, Planning, and Evaluation.

SPONS AGENCY Bureau of Education for the Handicapped (DHEW/OE), Washington, D.C.; Bureau of Elementary and Secondary Education (DHEW/OE), Washington, D.C.

PUB DATE Feb 74

NOTE 72p.

EDRS PRICE MF-\$0.75 HC-\$3.15 PLUS POSTAGE

DESCRIPTORS Administrator Guides; *Educational Assessment; *Educational Needs; Educational Objectives; *Educational Planning; *Models; Program Evaluation; Systems Approach

IDENTIFIERS Elementary Secondary Education Act Title V; ESFA Title V; *Needs Assessment; Project Next Step

ABSTRACT

A needs assessment is a procedure or process that identifies the perceived or expressed needs of a school district. The process involves the use of various measurements and activities to obtain the data needed to define the gap between "what is" and "what should be." This handbook reviews four such processes or models for identifying needs. A planning overview explains what comprehensive planning consists of, the sequence of steps in the process, a generic planning model, and why a comprehensive planning process should be instituted in a school district. The overview is followed by a rationale for doing a needs assessment, the steps to begin, and the results that can be anticipated on completion of, a needs assessment. To aid in the selection of a model, the criteria used to choose the models for this handbook are presented, as well as a summary of each model and a matrix of model characteristics. A final section focuses on who is involved, what activities take place, and what happens after the needs assessment is completed in each model. Appendixes contain a list of definitions from each model, a list of questions to help districts evaluate a needs assessment, and one general and four selected short bibliographies. (Author/WM)

NEEDS ASSESSMENT IN EDUCATION

A Planning Handbook for Districts

No 3. in a Series of Handbooks on Comprehensive Planning
for Local Education Districts

- Development Team -

Jean Pundiak, Betsy Barnard, Martine Brizius

- Special Assistance -

Kenneth Pack, Frederick Ryan Jr., Vivian Sobke

- Project Director -

Bernard Kaplan

State of New Jersey
Department of Education
Divisions of Research, Planning and Evaluation/Field Services
Bureau of Planning
225 West State Street
Trenton, New Jersey 08625

February, 1974

This handbook is a product of Project Next Step, funded by a Title V grant from the U.S. Office of Education, Bureau of Elementary and Secondary Education and Bureau of Educationally Handicapped.

Planning Handbooks for Local Districts

- ** No. 1 Comprehensive Planning in Education
- ** No. 2 Goal Development in Education
- * No. 3 Needs Assessment in Education
- *** No. 4 Problem Analysis in Education
- *** No. 5 Implementation in Education
- *** No. 6 Evaluation in Education
- ** No. 7 Planning Bibliography for Education

- * Available
- ** in preparation
- *** Projected

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Foreword

In the summer of 1973 the Office of Planning of the New Jersey Department of Education conducted a special survey of school districts in New Jersey. The results of this survey indicated that 90% of the districts replying desired more information about comprehensive planning models and needs assessment techniques.

This handbook represents the response of the Office of Planning, now called The Bureau of Planning, to the expressed desire of the school districts. The first section of the handbook describes the comprehensive planning process and gives general information about needs assessment. The next four sections contain descriptions of four planning and needs assessment models: (1) Fresno, (2) Dallas, (3) Phi Delta Kappa, and (4) Worldwide. These models, though similar in their overall concept of planning, contain a wide variety of methods and techniques. It is hoped that in looking at these models, a district will be able to choose the approach to needs assessment that best suits the unique requirements of the district or community.

The production of this handbook was funded through Project Next Step: Mutuality of Planning, a five-state project of the U.S. Office of Education, administered in New Jersey by the Bureau of Planning. The Bureau of Planning, New Jersey School Boards Association together with the two Educational Improvement Centers, South and Northwest, are participating in the Cooperative Planning Project, a program designed to help promote educational planning in local districts throughout New Jersey. The Cooperative Planning Project intends to publish a series of booklets and handbooks about various aspects of educational planning. Once such handbook has been developed by the "Our Schools" Project - Goal Determination in Education: A Handbook for Districts. The handbook can be obtained by writing:

Bureau of Planning
Department of Education
225 West State Street
Trenton, New Jersey 08025

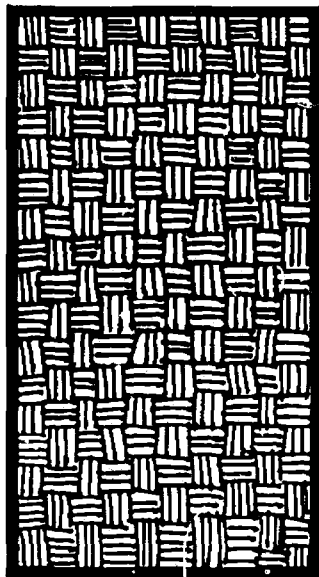
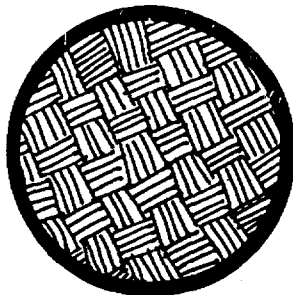
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INTRODUCTION

A. WHAT IS IN THE HANDBOOK?

This handbook is divided into six sections: an introduction, a planning overview, a needs assessment overview, a comparison of the four planning models, descriptions of the four models, and appendices.

PLANNING OVERVIEW

The planning overview explains what comprehensive planning consists of, the sequence of steps in the process, a generic planning model, and why a comprehensive planning process should be instituted in a school district. This section is a brief introduction to the concepts of comprehensive planning. Another handbook with a more thorough explanation of the generic planning model and its application to educational planning will be published in the future. Since needs assessment ideally is a part of a larger planning process and not an activity independent and complete in itself, the explanation of the comprehensive planning process emphasizes these inter-relationships.

NEEDS ASSESSMENT OVERVIEW

This section presents a rationale for doing a needs assessment, and the results which can be anticipated upon completion of a needs assessment. Suggested steps for beginning a needs assessment are listed along with examples of letters, news releases, reports and time lines.

COMPARISON OF MODELS

To aid in the selection of a model, this section contains the criteria used to choose the models for the handbook, a summary of each model, and a matrix of model characteristics.

MODELS

This section focuses on who is involved, what activities take place, and what happens after the needs assessment is completed in each model. A diagram of each model's planning process and relevant examples are included.

APPENDICES

The appendix contains a list of definitions from each model, a list of questions to help districts evaluate a needs assessment, and a bibliography of selected references on the subjects of: general bibliographies, instruments and techniques for collecting data, models, managing a needs assessment, and planning.

B. HOW TO USE THE HANDBOOK

DOES THIS HANDBOOK TELL YOU EVERYTHING ABOUT HOW TO CONDUCT A NEEDS ASSESSMENT?

No. Though there are some 'how to' aspects of this handbook, detailed instructions for conducting a needs assessment must be obtained by writing to the publisher of each

model described in the handbook. Addresses, costs, and kinds of materials available are listed after the description of each model. Additional references about planning models, needs assessment models, and management tools are contained in a selected bibliography in the appendix.

WHO CAN USE THE HANDBOOK?

1. District personnel for a district-wide needs assessment
2. School principles for a school needs assessment
3. Coordinators of special educational areas, such as special education, career education or vocational education, for an assessment of needs in that area.

WHEN SHOULD YOU START?

1. There is no one time to begin. District needs must be considered along with time requirements of the models. The Dallas process, for example, must coincide with the budgetary cycle while others should begin early in the school year in order to avoid summer meetings.
2. Since widespread involvement of the community, teachers, students, and administrators is a vital requirement for a needs assessment, events should be scheduled so that the greatest number and cross section of people can participate.
3. A needs assessment should not be postponed until all other on-going studies, task forces, and projects have been completed because there will always be something happening that will affect how needs might be assessed. The results of such activities should, however, be incorporated into the needs assessment whenever possible.

WHERE SHOULD YOU START?

1. If no district goals or needs have been identified, start at the first step of one of the models.
2. If district goals have been established, start with the needs assessment phase of a model.
3. If a few critical needs have been identified, apply the techniques from the problem analysis phase to discover solutions. A needs assessment should also be initiated simultaneously to identify other needs.

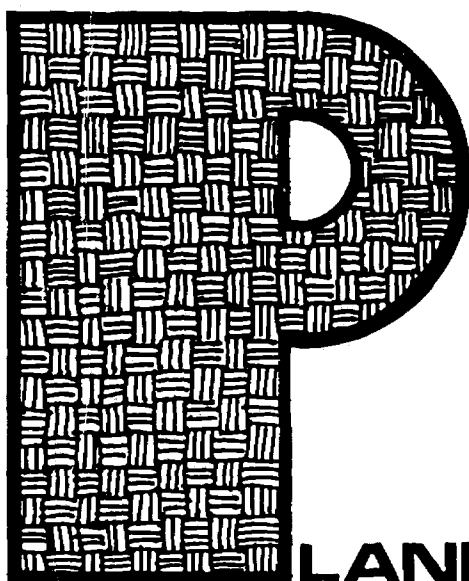
WHICH MODEL SHOULD YOU USE?

1. Use the matrix of model characteristics in this handbook to contrast the models, and select one best suited to your district.

2. Another alternative is to synthesize a new model from parts of existing models, to meet the particular needs of a district.

HOW OFTEN SHOULD YOU DO A NEEDS ASSESSMENT?

1. Models that require extensive community and staff involvement are usually done once, and then repeated several years later.
2. Others are simpler and lend themselves to a yearly application.
3. A district may also decide to do an extensive needs assessment the first year, and in subsequent years a simplified version.



LANNING OVERVIEW

A. WHAT IS COMPREHENSIVE PLANNING?

A comprehensive planning process is a systematic procedure for answering the following questions: Where have we been? Where are we now? Where are we going? How are we going to get there? How will we know when we get there? How will we monitor the process? The result of a comprehensive planning process will be the design and implementation and evaluation of programs tailored to fulfill the identified needs and achieve the districts educational goals.

B. GENERAL STEPS IN A PLANNING PROCESS

COMMITTMENT TO BEGIN SYSTEMATIC PLANNING

This procedure is usually initiated by one or more staff members or an administrator who introduces the idea to the district. The school board must then either formally reject or accept the idea of adopting a comprehensive planning process.

GOAL DEVELOPMENT

This step defines "what should be" in broad, timeless terms. Goals should express the general desired outcomes of the planning process. Many models consider it desirable that goal determination proceed needs assessment so that the goals are not just problem-oriented. Other models stress frequent revision of both goals and needs because of their close inter-relatedness.

NEEDS ASSESSMENT

This stage entails the specification of the discrepancy between "what is" and "what should be." This gap, or need, should always be related to the learner. All other needs, such as the institutional ones, should ultimately be related to these learner needs. Often this stage also includes an assignment of priorities to the needs. Some models place needs assessment before goal development on the premise that assessing "what is" first leads to more realistic identification of "what should be."

PROBLEM ANALYSIS

This stage examines the reasons for the discrepancy between goals and needs, identifying the elements of the problem, their causal relationship, the relative impact of each, and the degree to which each can be altered.

GENERATION OF ALTERNATIVES

From this examination of the problem flows the development of various alternative solutions. These alternative methods are analyzed in terms of effectiveness (quality), cost, time, consequences on other goals, impact (quantity), political feasibility, and other side effects.

SELECTION OF ALTERNATIVE

Based upon the analysis of the various alternatives in the preceeding step, one of the alternatives is chosen for implementation. In this stage, the decision-makers can include the same group involved in earlier stages or a person or group not previously involved in the process.

IMPLEMENTATION

At this point, the selected program is developed into a plan of operation and carried out by the administrative mechanism. Persons who planned the program may or may not be involved in its implementation. In either case, the program design should provide for feedback to the implementors in order to give an on-going measure of how well the program is meeting the goals and objectives.

EVALUATION

This step examines the success of implemented programs in achieving the established goals and objectives. Feedback from this stage provides the basis for modifying all steps of the process in order to improve attainment of the goals. In some models, evaluation is the first step in the process instead of the last, defining "what has been", before proceeding to "what should be."

RECYCLE

The entire process is repeated since, in a rapidly changing society, goals and needs must be continually redefined to reflect new conditions and new priorities.

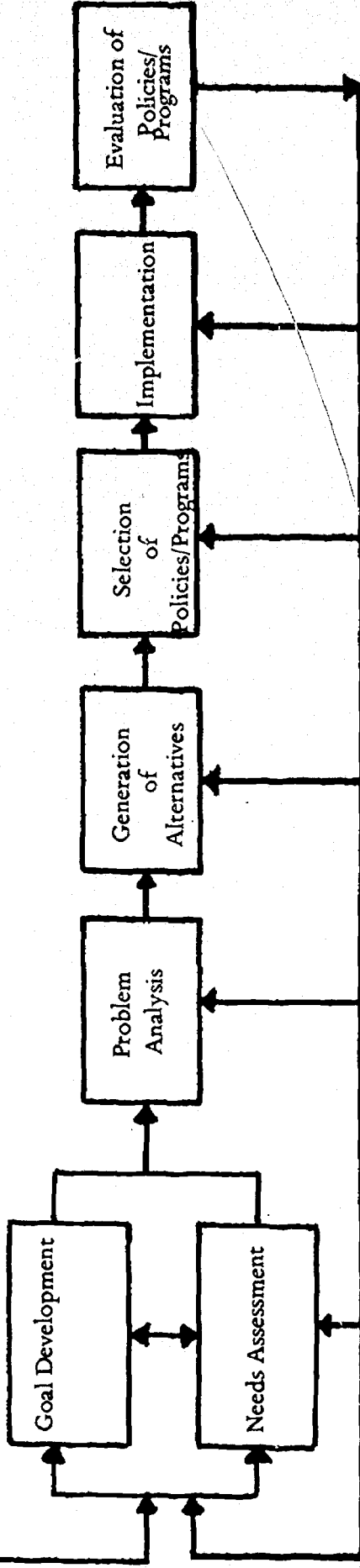
C WHY DO COMPREHENSIVE PLANNING?

In comprehensive planning, each step provides a solid base for the following step. The first steps, goal development and needs assessment, are pointers; they provide a clear statement of where a district wants to go. They, in turn, lead into detailed analysis of the problems related to specific identified needs. The problem analysis provides knowledge of important facts and causal relationships necessary for finding the most effective solution. Problem analysis is followed by the next steps, generation of alternative solutions and selection of the most appropriate one for the situation. The comprehensive approach tries to insure that the solution will fulfill, partially or completely, the stated goals of the district. Evaluation takes place throughout the process, not just during the implementation stage.

Based on the results of the evaluation, goals can be redefined and the assessment of needs can be modified. This evaluative feedback enables the planners to make necessary corrections, adjusting the plan as they proceed. Comprehensive planning does not provide all the answers but it does provide for continual appraisal of the district's efforts to meet the needs of its students.

Commitment to
begin Systematic
Planning

GENERIC PLANNING MODEL



Developed by
Bureau of Planning
Divisions of Research, Planning
and Evaluation/Field Services
New Jersey Department of Education
December, 1973

The comprehensive planning process is a systems approach. It recognizes the interrelationships that exist among the elements of the whole educational system and the fact that any change in one part can have an important effect on the rest of the parts. Comprehensive planning provides decision makers with better information which, in turn, facilitates better administration of a district's present and future operations.

Through comprehensive planning, questions that are fundamental to the existence and function of the school can be answered. Each district should ask itself:

- a. Why are we here? (philosophy of the district)
- b. Where are we now? (assessment of present situation)
- c. Where do we want to go? (goals of the district)
- d. How are we going to get there? (alternative solutions)
- e. How will we know we got there? (evaluation)

These questions are the basis for a comprehensive planning process. They provide a district with an organized, thorough and informative self-evaluation.

A comprehensive plan, through this logical sequence of steps, provides the Board of Education and the community with an explanation of where their money is going, what it is expected to accomplish, how long it will take, and how well it is succeeding. Furthermore, when conducted for more than one planning cycle, comprehensive planning provides an excellent way of building on past experience. This continuity proves especially valuable in transition periods caused by changes in leadership.

Most important, the institution of a comprehensive planning process helps a district provide quality education for all its students. The implementation of programs and solutions is not dependent only on current crises but rather based on a complete analysis of goals, needs and problems.

NEEEDS **ASSESSMENT OVERVIEW**

A. WHAT IS A NEEDS ASSESSMENT?

A needs assessment is a procedure or process that identifies the perceived or expressed needs of a school district. The process involves the use of various measurements and activities to obtain the data needed to define the gap between "what is" and "what should be." This handbook reviews four such processes or models for identifying needs.

B. WHY DO A NEEDS ASSESSMENT?

There can be many reasons for and benefits from conducting a needs assessment. Different districts can benefit in different ways depending upon their individual needs and circumstances. In some cases there already is community pressure for citizens to express their views. A needs assessment will provide greater citizen involvement, and do it in such a way as to systematically tap those views. A knowledge of these views can be especially valuable in districts which have been suffering school budget defeats.

A needs assessment can also be the ideal approach for districts which have problems, but cannot pinpoint precisely where they lie. For districts with new programs that haven't worked, a needs assessment might show that the real problems were not attacked. An assessment can help develop well-defined, verifiable educational goals and clears a smoother path toward achieving those goals. This advantage is important for those districts which have already developed goals, but don't know what to do next.

By conducting a needs assessment, districts will also be developing a data base for future educational decisions and establishing a resource bank of information on the district. They will provide themselves with a means for reducing internal and external problems, and for developing an organizational structure and process for continued self evaluation, as well as a basis for further planning and problem solving. Finally, the process provides a basis for the allocation of limited funds to solve identified problems and needs.

C. HOW TO BEGIN A NEEDS ASSESSMENT

In order to begin a needs assessment, initial approval should come from the administration. (See Figure I.) It is essential that in accepting the process the board be committed to change if the study indicates the necessity.

WHAT SHOULD THE ADMINISTRATION DO AFTER THE DECISION IS MADE?

1. Appoint an administrative team - Team might be composed of a principal, a vice principal and a teacher.
2. Orient and prepare team - Members of the administrative team should be thoroughly familiar with the process and ultimate goal of an educational needs assessment. The administrative team should read up on the subject, attend conferences, and consult with other districts.
3. Orient staff - Inform the members of the faculty of the goals of an educational needs assessment through faculty meetings and school information news releases. (See Figure II.)

4. Appoint a coordinator - Major task is to coordinate the activities and reports resulting from the needs assessment activities. (See Figure III.)
5. Appoint a committee - Major task is to carry out the needs assessment.

WHO SHOULD BE ON THE COMMITTEE?

The committee should be representative of the staff, students, administration, and community. (See Figure IV.) Some possibilities could be:

1. a board member
2. a community member
3. someone from central administration
4. a representative of the teaching staff
5. a representative from school administration
6. a student
7. a person knowledgeable in testing and research techniques
8. a parent

WHAT ARE THE MAJOR RESPONSIBILITIES OF THE COMMITTEE?

1. Plan and manage the implementation of the needs assessment.
2. Identify and document the educational concerns and problems that exist in district (based on data gathered in the needs assessment.)
3. Prepare a final report for the superintendent and the Board of Education.

HOW SHOULD THE COMMITTEE PLAN A NEEDS ASSESSMENT?

1. Discuss and define the rationale and objectives of doing a needs assessment.
2. Determine budgetary, time, or other constraints.
3. Based on the project objectives, examine various models and select one that fits the district.
4. Become thoroughly oriented to the model selected, through reading, workshops, training, consultants.
5. Begin planning needs assessment activities based on model and suggested revisions. (See Figure V.)

APPENDIX J

NEWS RELEASE #2
APPROVAL BY BOARD AND SELECTION PROCEDURE

At a meeting last night the Board of Trustees of the _____ School District voted unanimously to adopt a plan for developing educational goals with the cooperation of teachers, students, and a committee of citizens.

The plan was described in detail by _____ (name and position) who stressed the importance of moving the schools into a position of accountability for meeting goals approved by the community. He also pointed out the success that this plan has enjoyed in dozens of California communities where it has been applied.

Following approval of the plan the Board discussed various methods of selecting the citizens committee that will rank the educational goals. Superintendent _____ emphasized that if the schools are to represent the people of the community, a concerted effort must be made to insure that a broadly representative cross section of the community is selected to establish the goals.

The Board agreed that selection of the citizens committee should be made by _____ (process) _____. The committee of from _____ to _____ members is to be selected not later than _____ (date) _____. Superintendent _____ will be available for consultation to assist in getting the committee into operation.

As soon as the community representatives are selected, meetings will be scheduled to rank educational goals in order of their importance. After the goals have been ranked, the committee will meet again to determine how well the schools are presently meeting these goals. This is the first step in a detailed process that will include training sessions for teachers in the writing of objectives. After the objectives are written, they will be matched to the educational goals approved at the first meeting.

APPENDIX K

SAMPLE LETTER #1
TO COMMUNITY REPRESENTATIVES

Dear _____ :

The Board of School Trustees is requesting your participation in a valuable and unique process concerning the schools. Your assistance, in cooperation with other representative members of our community, is needed to help the district establish educational goals for learners.

We believe that this process will be different from many approaches to educational planning and will provide a stimulating and rewarding experience for those who participate. We are asking for a commitment on your part to assist us in this extremely important activity.

If you agree to provide this assistance to the district, we will ask you to attend two evening meetings. The first will be held on _____ and the second, one week later, on _____. Both meetings will begin at _____ p.m. — both meetings are scheduled to last no longer than three hours.

The purpose of the first meeting is for this representative group from the community to list in order of importance educational goals for our schools. At the second meeting, we will ask the same citizens to look at each goal and to provide answers to the question: "In my opinion, how well are current programs meeting this goal?"

This process of ranking the goals in order of importance will give your district's teachers guidance and direction in their planning of lesson materials. During the course of several months, the teachers and administrators will then be writing measurable objectives to meet the requirements of the goals you have helped to set for the community.

Source: Phi Delta Kappa Administrator's Manual on Educational Goals and Objectives, P. 14



dallas independent school district

September 13, 1973

Nolan Estes
General Superintendent

TO: ALL PRINCIPALS

SUBJECT: OPERATION INVOLVEMENT

The Operation Involvement process in the Dallas schools is, as you know, of great importance to our model for shared decision-making. The role of the principal in this process significantly determines the degree to which success is actually attained.

It is extremely desirable that the principal assume a posture of leadership in local school efforts by meaningfully involving staff members in the long-range planning for improving the quality of education in our city. Opportunities should be provided for interaction between the principal and the Operation Involvement representative, the Teacher Advisory Committee and the total faculty at the appropriate times concerning educational needs, priorities and programs. Through the establishment of an effective intra-school communications network, principals can ensure that all staff members are adequately informed of current progress, and can receive the necessary feedback for quality decision-making.

The next session for Operation Involvement participants will be conducted during the released time on Friday, September 14, 1973. An agenda for the meeting and several of the discussion items are enclosed for your information. Please review these items with your building's representative, and develop adequate strategies for increasing faculty awareness of the results of Operation Involvement activities and meetings.

Thank you for your cooperation in this very important but extremely difficult task of educational decision-making, Dallas-style.

Sincerely,

Nolan Estes
General Superintendent

NE:cvw

Enclosures

DALLAS INDEPENDENT SCHOOL DISTRICT

March 1, 1973

OPERATION INVOLVEMENTResults of Board of Education RetreatGENERAL COMMENTS:

In an effort toward continuing shared decision-making through the Operation Involvement process, the Dallas Board of Education conducted a most successful retreat on February 22-23, 1973, at the School Administration Building. Participants who attended the Board Retreat considered it to be a most worthwhile experience, well worth the time and expense. Representatives from the Classroom Teachers of Dallas, Dallas School Administrators Association, District Communications Committee, Parent-Teacher Association, and the Superintendent's Student Advisory Committee all expressed positive reactions to the Retreat. Some specific comments by participants included:

"This has been the best interaction we have ever had."

"Those teachers are great; they call a spade a spade."

"We are growing in our mutual trust and confidence; we couldn't have done this three years ago."

"The hidden agenda really came out."

"Good session, it was the model of what it should have been."

BASIC OUTCOMES:

The Board members agreed that we should not budget more than our projected income, and set a mark of \$114 million, which is the projected income with no tax increase. It was also suggested that Executive Team members attempt to incorporate the Board's priority items into the budget development process, while maintaining the \$114 million maximum. The programs which received highest priority were:

1. Implementation of all no-cost improvements.
2. Refinement of present programs after cost/effectiveness studies.
3. Early Childhood Education (additional paraprofessionals).
4. Plan A Special Education (expansion).
5. Career Education (addition of 700 students at Skyline C.D.C.)
6. Vocational Career Education Units (expansion where District can take advantage of additional State funding.)
7. Staffing of a Foundation income-producing group.
8. Bilingual Education (expand to grade 4).
9. Departmental Team Leaders (reduced teaching assignment).
10. Tutoring-Reading Program (additional assistance - E.S.A.A.)
11. Instructional Resource Packages (12 pilot elementary schools on a competitive proposal basis.)
12. Research and Evaluation.
13. Security Program.
14. Urban Teacher Education (E.S.A.A.)
15. TARP Reading Program (expand to grade 5 - Title I)

TOPICS OF FUTURE CONCERN:

1. School Finance.
2. Teacher Competence and Quality of Education.
3. Teacher Evaluation procedures.
4. Personnel Policies.
- Special Program replication or elimination.
- Cost/effectiveness studies.

GUIDELINES FOR SELECTING A NEEDS ASSESSMENT COMMITTEE

Source: Next Step: Procedures for Harvesting Educational Concerns, book 1.7-9
Worldwide Education and Research Institute, p. 30

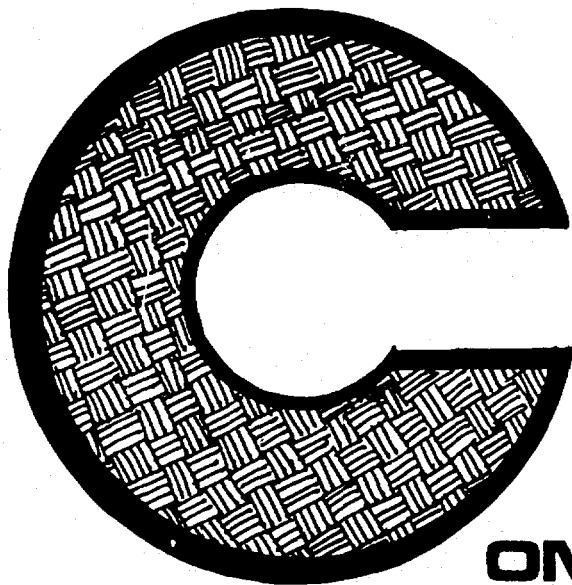
Figure V

DALLAS INDEPENDENT SCHOOL DISTRICT

OPERATION INVOLVEMENT

1972-73 MEETING ACTIVITIES

SEPTEMBER 8	-	NEEDS ASSESSMENT AND PRESENTATION OF 1973-74 BUDGET PREPARATION CYCLE.
OCTOBER 27	-	INPUT FOR GOAL DEVELOPMENT.
NOVEMBER	-	BOARD RETREAT.
DECEMBER 8	-	DEVELOP GOALS AS BUDGET GUIDELINES.
JANUARY 12	-	DETERMINE COSTS OF EACH GOAL'S TASKS.
FEBRUARY 9	-	ANALYSIS OF GOALS' FEASIBILITY.
MARCH 2	-	ESTABLISH GOAL PRIORITIES.
		BOARD RETREAT.
APRIL 6	-	ASSIGN RESOURCES TO PRIORITY GOALS.
MAY 11	-	REVIEW FINAL BUDGET PROPOSAL.



COMPARISON OF MODELS

18

A. HOW WERE THE MODELS CHOSEN?

The four models presented in this handbook are not the only models available. Many others exist. These were selected because they meet a set of basic criteria and yet have unique specific characteristics. The set of basic criteria utilized for selecting the planning models is:

1. Widespread participation - A broad representation of the community, professional staff, and students must be involved in some part of the planning process.
2. Comprehensiveness - The needs assessment stage must relate to a continuing planning process. If the model ends after the needs assessment phase, the technique must be adaptable to other planning processes. The model must identify learner needs and indicate methods to resolve the needs.
3. Field testing - The model must have been tested in local school districts and produced the results the user anticipated. Each model, except Dallas, has been field-tested throughout the United States.
4. Replicability - The model must be easily replicable. Explanatory materials and training kits or courses must be available. Outside technical assistance needed to implement the model should be minimal.
5. Reasonable cost - The monetary cost to implement the model must be generally minimal. Costs should be limited to the planning model materials, provisions for one or more community meetings, supplies (paper, pens, envelopes, etc.), limited technical assistance (possibly only for an initial training course for one or two people). The cost in terms of staff time can vary greatly. In some models considerable staff time must be committed to the project; in others, very little. None of the models selected requires a major expenditure such as computer time. It should be noted that though the costs to implement the planning model may be minimal, the output (i.e., new educational programs, policies) of the planning model may well require a major monetary commitment.

B. SUMMARIES OF MODELS

DALLAS

The purpose of the Dallas planning process is to assist the Board of Education and the administration in assessing needs, assigning priorities and allocating resources as a part of the annual budgeting process. The two major groups involved with the board are:

1. Program Managers - appointed for each of the district's long-range goals, responsible for evaluation and development of objectives and program budgets.
2. Operation Involvement - a committee of teachers, students, administrators, parents, and community persons which assesses needs, prioritizes them and allocates resources among programs.

The annual budgeting process has ten phases:

1. Evaluation
2. Needs Assessment
3. Goal Determination
4. Cost Determination
5. Feasibility Study
6. Prioritization
7. Resource Allocation
8. Operational Objectives
9. Public Hearing
10. Adoption by Board of Education

Program managers monitor the progress of their portion of the budget throughout the process. The Operation Involvement representatives are involved in four different ways:

1. At monthly small group meetings throughout the year, representatives examine particular district programs as well as study and discuss goal priorities and costs.
2. A needs assessment survey during Phase 2 prioritizes needs and determines the largest gaps between what is and what is desired.
3. The entire Operation Involvement group meets preceeding each of the board's weekend retreats on the budget to establish a consensus on recommendations to the board.
4. Representatives of the small groups attend two of the board's budget retreats: during Phase 2 to present goal priorities, during Phase 6 to recommend priorities for goals based on their budget cost.

FRESNO PLANNING MODEL

During the needs assessment and goal determination phases, activities center on a one-day community conference. At this meeting the participants express their views about what things are preventing the schools from operating optimally, and what the schools should be doing for students. A small task force of teachers and administrators classify, prioritize and re-write the expressed community needs into goal statements.

After the goals and needs have been reviewed by the school board, high priority goals are assigned to teams of administrators and teachers who write objectives. These objectives should answer these questions:

- a. Who will do what?
- b. How well?
- c. Under what conditions?

Using problem solving techniques, programs are designed to meet these objectives. Since the objectives state what the expected outcomes should be, evaluations of the projects is facilitated.

PHI DELTA KAPPA

The Phi Delta Kappa model is a three phase planning process

Phase I - Goal Determination and Needs Assessment

1. Educational goals are ranked by the Community committee.
2. Perceived levels of school performance in meeting the goals are determined by the community, professional staff, and students.
3. Needs are ranked in priority order.

Phase II - Performance Objectives

1. Professional staff are trained to write performance objectives.
2. Performance objectives are written for current programs of instruction relating to goals.

Phase III - Implementation

1. Program objectives are developed for new programs to meet goals.
2. A Management design is developed for efficient utilization of resources needed to meet the performance objectives of the district.

The purpose of the planning process is to allow a district to follow a series of strategies that will develop community-ranked goals and teacher-developed objectives. This planning approach has been developed to provide a logical and orderly process that will involve community, professional staff, and students in:

1. Ranking of educational goals in order of importance.
2. Assessing how well current educational programs are meeting these goals.
3. Development by the professional staff of program level performance objectives designed to meet the priority-ranked goals.

WORLDWIDE

The Worldwide needs assessment model provides one alternative procedure for identifying needs. The model outlines how the needs assessment could be managed and possible activities for collecting data.

Briefly, there are two groups involved:

1. Quality Assurance Committee - a large representative group whose function is to plan and manage the needs assessment and identify and document the needs.
2. Educational Needs Assessment Committee - a smaller specialized group that validates and prioritizes the identified needs.

After the committees are formed and oriented to the needs assessment process, they begin collecting the necessary data to identify their needs using: community speak-ups, surveys of teacher, students, and administrators, test results, and administrative information. After the data is collected it is validated and prioritized. These critical needs are then documented and published.

C. MATRIX OF MODEL CHARACTERISTICS

estion		Dallas		Fresno		PDK		Worldwide	
1.	Who participates in the process?	Parents, students, teachers, administrators, district employees, Board of Education.	Community members - task force of teachers and administrators	Representative teachers, administrators, students, community members.	Representatives from all sectors of education community (i.e. parents, administrators, teachers, students.)				
2.	What is the extent of community participation?	Can be as broad as desired	Wide-spread	40-80 community members	Very extensive				
3.	How are community participants selected?	Elected, appointed or voluntary	Open invitation to community	3 options - randomly - by Superintendent or School Board - Selection based on criteria	By invitation from Needs Assessment Planning Committee				
4.	Are needs prioritized?	YES	YES	YES	YES				
5.	What are the tools of the needs assessment?	Needs assessment surveys, Reactionnaire, and Small group investigations.	Speak-ups for community members	Game - a procedure to prioritize goals, and survey of perceptions	Surveys, speak-ups, questionnaires, concerns conferences				
6.	What is the output of the needs assessment?	Lists of priorities and greatest gaps.	List of prioritized needs	List of prioritized goals, List of prioritized needs	Needs and concerns of community students & teachers; data from existing tests & measures; and administrative data.				
7.	What happens after the needs assessment?	Program managers select goals for the coming year.	Needs converted into goals. Objectives are written for selected goals. Problem solving techniques used to design programs.	Performance objectives written for existing programs and then matched with goals	Needs converted into goal statements. Problem definition and analysis is carried out.				

MATRIX OF MODEL CHARACTERISTICS Cont.

Questions	Dallas		Fresno		PDK		Worldwide
	a. one year b. three months	a. one year b. two months	a. one year b. three months	a. one year b. two months	a. one year b. three months	a. one year b. three months	
8. How long is a. the whole planning process? b. the needs assessment?							a. two years b. 6-9 months minimum
9. What costs are involved?	Substitute teachers, materials and printing	\$12 for 3 booklets, and supplies. Lunch for one day community meeting.	Materials- \$60 for community kit \$1 for manual on performance objectives				\$37 for needs assessment material \$60 for film strip
10. What staff requirements are there?	One or more person to coordinate the process, depending on the size of the district.	One person to run community conferences. A task force of teachers and administrators	One person to coordinate two community meetings. One person to analyze data from survey				No extra staff is necessary. Need someone on staff who has sufficient time.
11. What explanatory materials are available?	5 booklets available from Dallas.	Three booklets available from Fresno.	Kits with all materials. Booklets on writing per- formance objectives. All available from PDK.				Detailed manual, explanatory filmstrip, available from World- wide.
12. Are any training programs needed?	No, but orientation to planning necessary for all participants.	No, but background in planning helpful.	Yes, one on goal determination and needs assessment and one on writing performance objectives				Yes.
13. Is the management of the process simple or hard?	No	Moderate	Relatively simple				
14. Are outside consultants needed?	No, if orientation can be done by staff	No	No				Available but not necessary

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NODELS

A. DALLAS PLANNING MODEL

The purpose of the Dallas planning process is to involve educators, students, parents and the community as well as the Board of Education in assessing needs, assigning priorities and allocating resources as a part of the annual budgeting process.

WHO IS INVOLVED?

1. Board of Education
2. Program Managers - appointed for each of the districts' seven long-range priority goals, to insure continuing progress of the planning process. They are responsible for evaluating program accomplishments and developing specific objectives and program budgets for five-year periods.
3. Operation Involvement - a 600-member committee which includes a representative of each school's teacher advisory committee, 45 students, 20 parents, principal representatives, central office staff and members of the District Communications Committee which represents all district employee groups. Representatives can be appointed, elected, or can volunteer or serve automatically because of job held. Citizens who are not parents can also be included. Outside technical consultants are not a formal part of the model.

IS GOAL DETERMINATION THE FIRST FORMAL STEP IN THE PROCESS?

No. Within the budget cycle, evaluation and needs assessment precede goal determination. Since the evaluation phase focuses on programs of the previous year, the needs and goal definition phases are also program-oriented and therefore possibly not comprehensive. In initiating the process, however, the board first elicits goal suggestions from staff, students and community members for establishing long-range (10 year) goals. Thus, this set of separately defined goals balances out, to some extent, the program focus of the yearly planning process.

HOW ARE NEEDS ASSESSED?

1. Program managers evaluate the accomplishments of on-going programs in light of the previous year's goals (or the long-range goals, if no others exist) and report findings to all individuals involved.
2. Smaller 24-member committees of Operation Involvement meet monthly to focus independently on various areas of the school program, in addition to reacting to feedback from program managers.

3. Individual perceptions of needs are collected through a needs assessment survey (see Figure I) in three steps.

- a. Various district functions, programs and activities are rated with a number from the following scale to describe the current condition.

Receiving Entirely Too Much Emphasis	Receiving More Than Adequate Emphasis	Receiving Adequate Emphasis	Not Receiving Adequate Emphasis	Receiving Not Nearly Enough Emphasis
15 14 13	12 11 10	9 8 7	6 5 4	3 2 1

- b. The same items are then rated according to the scale below to indicate the desired future condition for each item.

Substantially Decreased Emphasis	Decrease Emphasis	Continue Present Emphasis	Increase Emphasis	Substantially Increase Emphasis
1 2 3	4 5 6	7 8 9	10 11 12	13 14 15

- c. For each item rated as needing increased emphasis in the future, or as receiving too much emphasis currently, opinions regarding specific problems or areas of over-emphasis are elicited from individuals.
4. Needs assessment survey results are compiled for each interest group and for the group as a whole indicating priorities desired and areas with the greatest gaps. (See Figure II).
 5. Representatives of all the small Operation Involvement groups meet with the Board at its first weekend retreat on the budget to respond to and revise compiled needs.
 6. Based upon new needs, gaps are identified representing the discrepancy between the actual status of programs and the desired status.

HOW ARE GOALS DETERMINED?

1. Based upon previously established needs, program managers select goals to be worked on during the year.
2. Managers then design the vehicle (project) that will be used to accomplish the goal.
3. Results are communicated to all schools as well as Operation Involvement in the form of budget guidelines.

HOW ARE GOALS AND NEEDS CONVERTED INTO PROGRAMS AND POLICIES?

1. Program managers estimate the cost of each goal and its component objectives and tasks.
2. Managers examine each goal in terms of payoff and risk.
3. Results are communicated to all parties for their examination and feedback.
4. Representatives of small Operation Involvement groups rank all goals while attending the Board's second weekend retreat on the budget.
5. Based upon previously established priorities, each goal is assigned by rank order the necessary resources for its accomplishment until all available funds are exhausted.
6. Managers restate each goal into operational objectives for inclusion in the budget, using standard district budget terms.
7. Proposed budget is presented for a public hearing and appropriate adjustments made.
8. Proposed budget as adjusted is adopted by Board of Education.

HOW ARE PROGRAMS AND POLICIES IMPLEMENTED?

Budgeted programs are implemented within the existing administrative mechanism, and become subject to the evaluation phase of the planning model at the beginning of the next budget cycle.

1. Program managers secure all pertinent information relating to areas of concern, such as: test scores, evaluation reports, process reports, etc.
2. Managers analyze all information to determine successes and failures in terms of the established goals for that program year.
3. Managers determine the remaining gap (if any) between current program status and the desired status in terms of both one-year, and long-range objectives.
4. Remaining discrepancy is communicated to all participants in the planning process, for utilization in the needs assessment phase.

WHAT ARE THE IMPLEMENTATION FACTORS?

1. No special training is necessary to implement the Dallas model. Its first requires the firm commitment of the Board of Education. Then the means for determining representation of the various interest groups must be detailed. The Dallas materials

thoroughly explains the composition of representative groups for students, principals, administrators and other district employees. These descriptions constitute a useful guide, but are certainly not all inclusive. Dallas is presently experimenting with geographically-based citizen advisory groups, as well.

2. The major time constraint is that the entire process must be initiated so that it coincides with the budget cycle. This will probably necessitate conducting orientation for a new group well in advance of the beginning of the cycle. While the whole process takes a full year, the involvement of all the representatives is only necessary for approximately ten months. Dallas representatives spend approximately 1½ to 2 days per month on the project while administrators allocate about 3 days per month.
3. The costs of implementing the model are minor. Representatives are given release time for the monthly, small-group meeting. Some representatives attend two board weekend budget retreats during the year. Other costs incurred are tours of district facilities for representatives, several all-day sessions with lunch for all representatives and some extra postage and printing. Dallas, a district with 155,000 children, spent \$2000 for substitute teachers and \$3000 on materials, printing and duplication.
4. Materials consist mainly of a needs assessment tool and forms used to elicit and prioritize individual perceptions of needs and goals. Some sample forms are included in the Dallas model, but districts could also devise their own. Materials available from Dallas are: Sharing Decisions - Dallas Style, Needs Assessment Survey, Preliminary Development Goals, Operations, Development and Management Goals, a supplement to the Operations Goals, and compiled results of some surveys. Currently there is no charge for these materials.

For further information and materials, contact:

Lawrence Ascopf
Communications and Community Relations Department
3700 Ross Avenue
Dallas, Texas 75204

DALLAS PLANNING MODEL

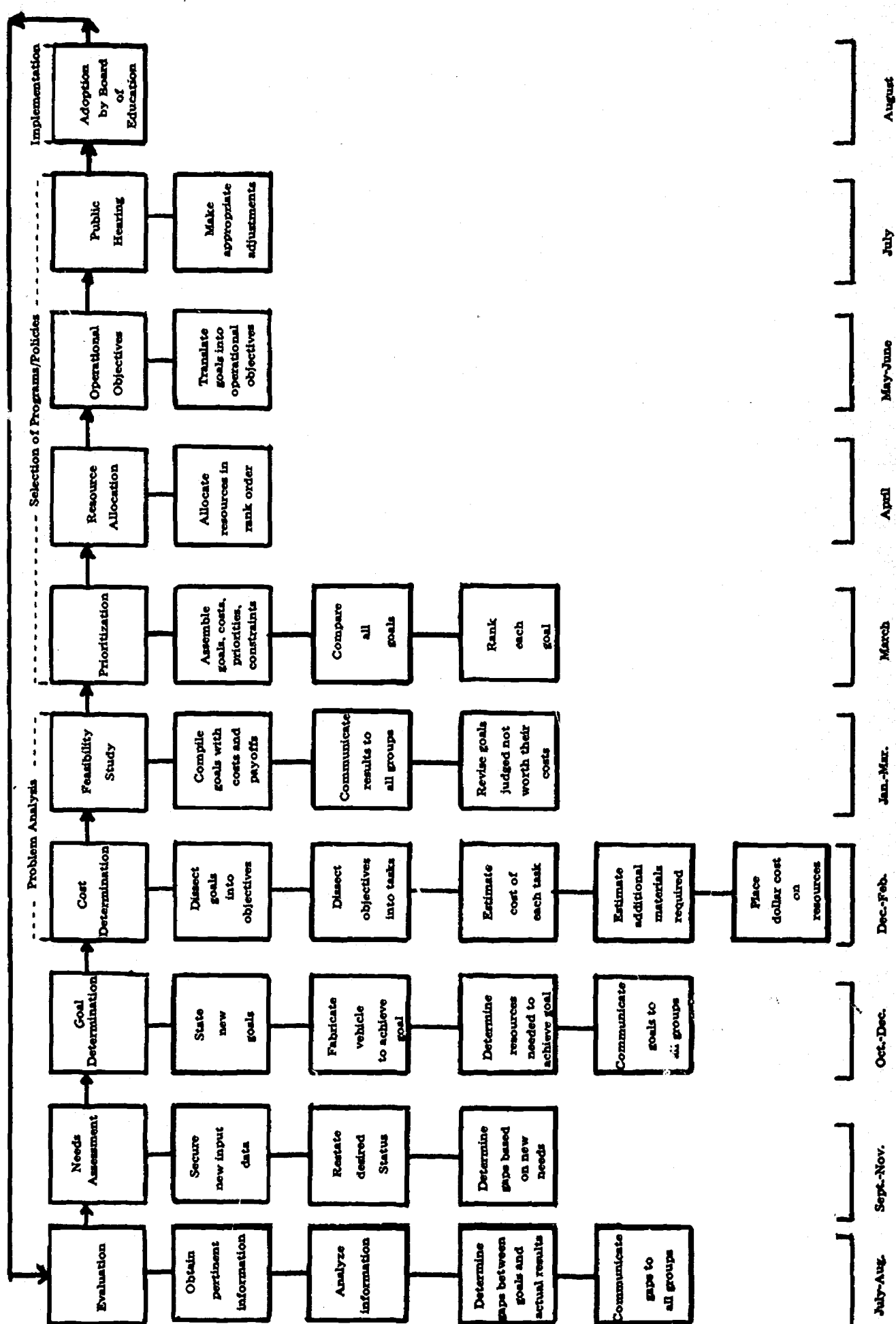


Figure I
DALLAS INDEPENDENT SCHOOL DISTRICT
1973-74 NEEDS ASSESSMENT SURVEY

CURRENT
CONDITION

DESIRED
CONDITION

I. Instruction

A. Bilingual Education _____

B. Career Education _____

1. Preparation (High School) _____

2. Exploration (Middle/Junior High School) _____

3. Awareness (Elementary) _____

C. Classroom Organization and Management _____

1. High School _____

2. Middle/Junior High School _____

3. Intermediate _____

4. Early Childhood _____

D. Creative Arts _____

E. Drug Education _____

F. Early Childhood Education _____

G. Foreign Languages _____

DALLAS INDEPENDENT SCHOOL DISTRICT

N E E D S A S S E S S M E N T S U R V E Y R E S U L T SPRINCIPALS:PRIORITIES DESIRED

1. Reading
2. Building Maintenance
3. Individualization of Instruction
4. Counseling Services
5. Employee Benefits & Salaries
6. Discipline
7. Classroom Organization & Management
8. Career Education (H.S.)
9. Psychological Services
10. Building Construction & Sup. Serv.

GREATEST DIFFERENCE (IS AND SHOULD BE)

1. Building Maintenance
2. Counseling Services
3. Building Construction & Sup. Serv.
4. Psychological Services
5. Career Education (Elem.)
6. Individualization of Instruction
7. Classroom Organization & Manage.
8. Discipline
9. Employee Benefits & Salaries
10. Reading

TEACHERS:

1. Employee Benefits & Salaries
2. Discipline
3. Counseling Services
4. Psychological Services
5. Career Education (Elem.)
6. Special Education
7. Reading
8. Employment Practices
9. Instructional Materials & Equip.
10. Condition of Facilities

1. Employee Benefits & Salaries
2. Discipline
3. Counseling Services
4. Psychological Services
5. Employment Practices
6. Special Education
7. Career Education (Elem.)
8. Instructional Materials & Equip.
9. Condition of Facilities
10. Personnel Evaluation & Promotion

PARENTS:

1. Individualization of Instruction
2. Reading
3. Counseling Services
4. Discipline
5. Personnel Evaluation & Promotion
6. Community Involvement
7. Classroom Organization & Mgmt.
8. Language Arts
9. Career Education (H.S.)
10. Mathematics

1. Individualization of Instruction
2. Counseling Services
3. Reading
4. Discipline
5. Classroom Organization & Mgmt.
6. Personnel Evaluation & Promotion
7. Personnel Services & Policies
8. Career Education (Elem.)
9. Community Involvement
10. Career Education (Jr. H.S.)

STUDENTS:

1. Counseling Services
2. Reading
3. Media & Library Services
4. Career Education (Jr. H.S.)
5. Individualization of Instruction
6. Language Arts
7. Discipline
8. Food Services
9. Special Education
10. Community Involvement

1. Counseling Services
2. Reading
3. Media & Library Services
4. Career Education (Jr. H.S.)
5. Community Involvement
6. Discipline
7. Food Services
8. Language Arts
9. Special Education
10. Individualization of Instruction

FIGURE II

DALLAS INDEPENDENT SCHOOL DISTRICT

N E E D S A S S E S S M E N T S U R V E Y R E S U L T S

COMPOSITE:

<u>PRIORITIES DESIRED</u>	<u>GREATEST DIFFERENCE (IS AND SHOULD BE)</u>
1. Employee Benefits & Salaries	1. Employee Benefits & Salaries
2. Discipline	2. Discipline
3. Counseling Services	3. Counseling Services
4. Reading	4. Psychological Services
5. Psychological Services	5. Career Education
6. Career Education	6. Personnel Employment Practices
7. Individualization of Instruction	7. Building Maintenance
8. Instructional Materials & Equip.	8. Reading
9. Building Maintenance	9. Instructional Materials & Equip.
10. Classroom Organization & Mgmt.	10. Special Education
11. Personnel Employment Practices	11. Classroom Organization & Mgmt.
12. Special Education	12. Personnel Evaluation & Promotion
13. Personnel Evaluation & Promotion	13. Building Construction & Sup. Serv.
14. Language Arts	14. Foreign Languages
15. Mathematics	15. Individualization of Instruction
16. Media & Library Services	16. Drug Education
17. Drug Education	17. Creative Arts
18. Foreign Languages	18. Mathematics
19. Physical Education	19. Non-Certificated Personnel
20. Visiting Teacher Services	20. Visiting Teacher Services

B. FRESNO PLANNING MODEL

WHO IS INVOLVED?

1. Project Director - an administrator, staff member or community person.
2. Steering Committee - 8 to 10 persons named by board and administrators; each asks tow others. Members should represent the entire community - students, recent graduates, parents, business and faculty - and be knowledgeable, enthusiastic and interested in continued participation.
3. Community Conference - participants solicited by open invitation to the community at large.

IS GOAL DETERMINATION THE FIRST FORMAL STEP IN THE PROCESS?

No. Goal determination is initiated after needs are assessed. However, goals developed in this manner may not be all-inclusive because they are in direct response to problem areas. They are problem oriented and should be recognized as such.

HOW ARE NEEDS ASSESSED?

1. A one-day community conference is held at each school site.
2. Participants, placed into groups of six and given paper and pens, respond to the question "What are the things that are keeping our school from doing the job it should do for the student?" Problems only, not solutions, should be listed.
3. The groups work for 30 minutes and exchange papers with other groups for comments and priority ratings of each response using the following scale:
 - a. Utmost importance
 - b. Very important
 - c. Moderately important
 - d. Little importance
 - e. unimportant
4. They receive their original work back, revise and write each response on a 5" x 8" card with the priority ratings of all the groups.
5. During the afternoon session, the groups concentrate on the questions What should your school be doing for the students? When the students graduate from school:
 - a. What knowledge should they have?
 - b. What skills should they have?
 - c. What kinds of attitudes should they have?

6. The responses to these questions should be in the areas of learning, student achievement and educational expectations.
7. These responses are exchanged with other groups and assigned priorities (see above rating scale).

HOW ARE GOALS DETERMINED?

1. The steering committee classifies and combines the needs from the conference.
2. Composite statements about what needs to be done are written and priorities determined by totalling the ratings given by the groups:
 - a. = 3 points
 - b. = 2 points
 - c. = 1 point
 - d. = 0 points
 - e. = 0 points
3. Those statements above a cut off total (for example above 5) are published, those below are eliminated.
4. The steering committee converts the statements of need into goal statements which include these three elements:
 - a. Who (will do)
 - b. What (board direction or general purpose)
 - c. Why (the intended effect)
5. The committee may decide to prioritize the goals by returning them to the community conference participants for ranking.
6. The goals are sent to the board for acceptance or rejection. If the board accepts the goals, it then issues instructions for the implementation of the goals and decides responsibility for the problem solving phase.

HOW ARE GOALS AND NEEDS CONVERTED INTO PROGRAMS AND POLICIES?

Once goals have been set, the next step is to establish objectives which will lead toward the accomplishment of the school's goals. The school's goals and objectives will later be of use to departments or classroom teachers as they proceed to establish objectives for their own operations.

1. A task force is created, consisting of teachers, department chairpersons, administrators and a board representative.
2. A goal is selected for consideration.

3. A list of goal indicators is written to answer these questions: "What would be the circumstances should this goal be effectively met?" or "If we had satisfactorily met this goal, what would things look like?"
4. The degree of desired achievement is determined.
5. An objective is derived from each of the indicators. Each objective should contain:
 - a. who (will do)
 - b. what
 - c. how well
 - d. when
 - e. under what conditionand stipulate how this will be verified.
6. A group problem-solving approach called "brainstorming" is used to produce new and workable ideas. Each participant is allowed to express ideas. One or more of the alternative solutions is analyzed using:
 - a. costs
 - b. attitudes toward possible solution (staff, students, community)
 - c. financial and other resources
 - d. success of similar ventures
 - e. time needed for implementation
 - f. other constraints or positive factors
7. Based on the above factors, one of the alternative solutions is chosen for implementation.

HOW IS EVALUATION ACCOMPLISHED?

If the objectives have been well written, the evaluation of the project is built in since the objectives state what the outcome should be. It is not necessary to wait until the project is completed to determine how well the objectives are being met. Success is more likely if checkpoints along the way are examined as the process unfolds.

WHAT ARE THE IMPLEMENTATION FACTORS?

For approximately \$12.00, three booklets can be purchased which describe the Fresno needs assessment and goal determination stages in the planning process.

School and Community: Partners in Education

Published by the Fresno County Department of Education
January, 1972

School District Goals

Published by EDICT, Regional Planning and Evaluation Center,
Fresno County Department of Education
May, 1971

School/District Profile

Published by the Fresno County Department of Education
January, 1971

School and Community: Partners in Education is a description of a Delphi-type technique for involving the school and a large and representative group from the community in a needs assessment and goal setting process. The technique is efficient, requires a minimum of time, and produces statements of needs and goals which are related to the local educational process as seen by those closest to it. Resultant goal statements are then the logical starting place for a problem solving procedure.

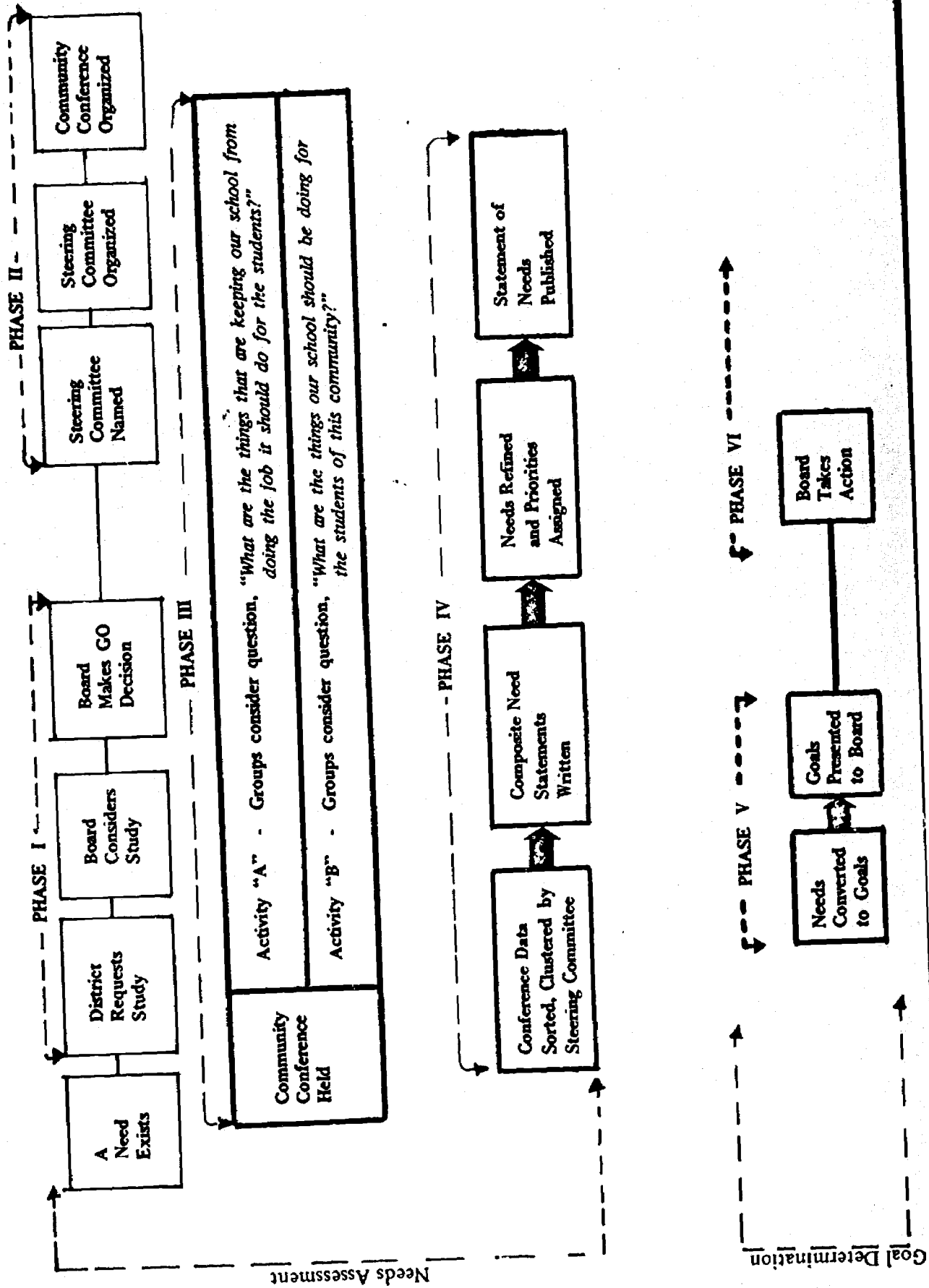
School District Goals was written for lay groups involved in school goal setting. It defines terms and presents some examples of goals statements, from the Cardinal Principles developed by the U.S. Bureau of Education in 1918 to Suggested Goals for Public Education in Texas in 1969.

School/District Profile is an instrument to be used in assessing the present state of a school or school district as compared to a checkpoint in the recent past. Such items as financial status, demographic data, administrative time, budgets, facilities and student achievement are analyzed and compared.

For further information and materials, contact:

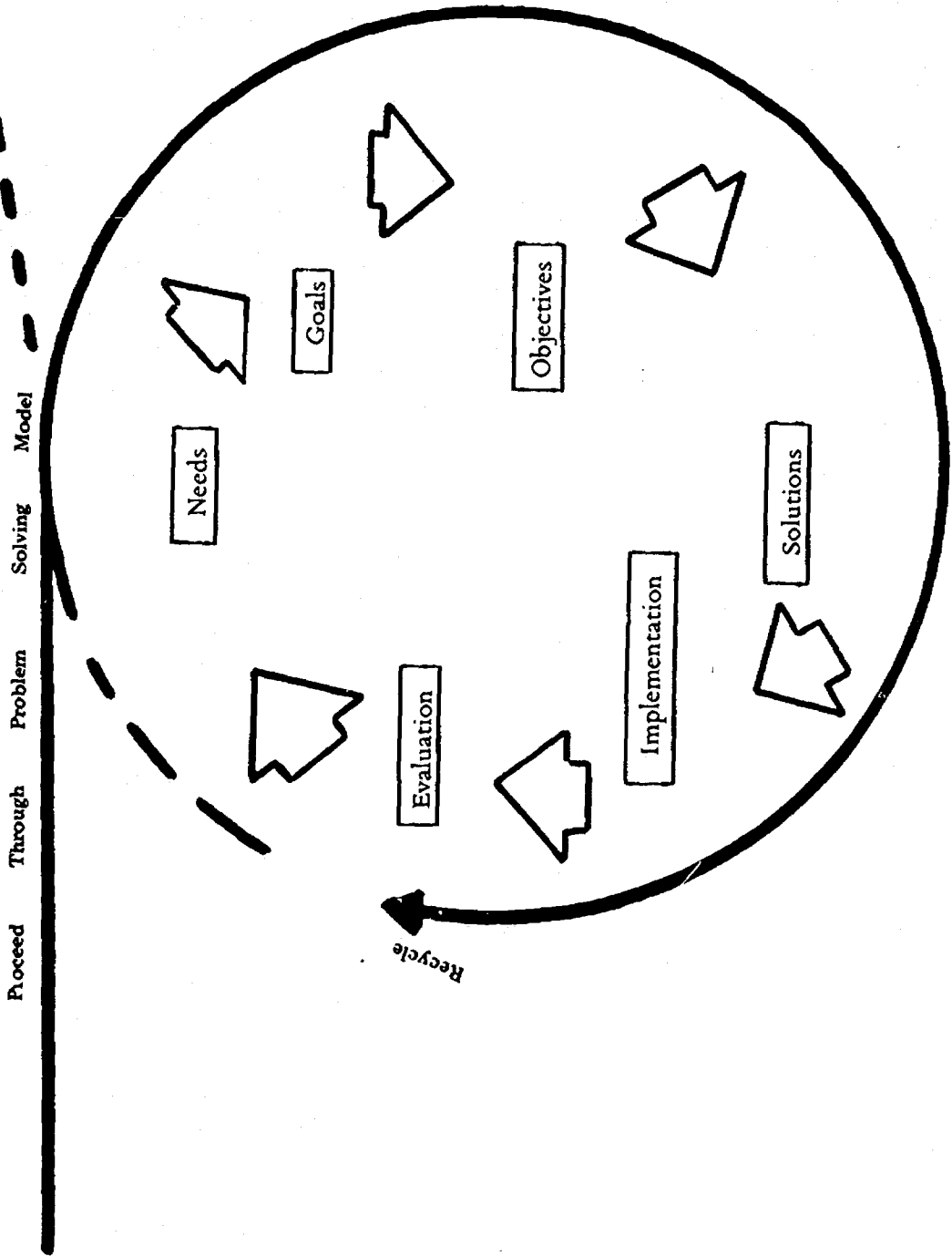
Fresno County Department of Education
Fresno, California

FRESNO MODEL NEEDS ASSESSMENT AND GOAL DETERMINATION



FRESNO PLANNING MODEL

MODIFIED SCHOOL PROGRAM



C. PHI DELTA KAPPA PLANNING MODEL

WHO IS INVOLVED?

Educational goals are ranked by a community committee of 40-80 people who represent a broad cross section of the community. There are several methods to select a broadly representative community committee:

1. Superintendent or School Board appoints the members.
2. Superintendent or Board develops a set of criteria upon which to base the selection of committee membership.
3. Members are selected randomly.
4. An open invitation to participate is issued to all citizens - a town meeting approach.

IS GOAL DETERMINATION THE FIRST FORMAL STEP IN THE PROCESS?

Yes. Eighteen educational goals are given as part of the model. These goals were developed in 1969 by the California School Boards Association and revised after a thorough analysis of goals from other states, pilot schools, and other sources. PDK believes these goals to be all encompassing; however, the district may choose to change or delete goals, or add others.

HOW ARE GOALS DETERMINED?

A forced-choice technique is used to prioritize the given goals. A game-like procedure using discs, a display board, and the given goals permits each individual to rate each goal. Small groups of four persons are formed to re-rank the goals through a group consensus process. All group scores are averaged to arrive at an overall committee ranking.

HOW ARE NEEDS ASSESSED?

At a second Community Committee meeting the members individually rate the goals to determine how well the school is meeting each goal. Similarly a representative group of professional staff and a group of students hold meetings to rate each goal.

Each goal is assigned a number from the scale below in response to the question "How well are the current school programs meeting this goal?"

EXTREMELY POOR	POOR	FAIR BUT MORE NEEDS TO BE DONE	LEAVE AS IS	TOO MUCH IS BEING DONE	Score										
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	

44 45.

Mean scores of the individual ratings for each goal provide the board, administrators, and teachers with a basis for deciding whether to revise existing programs or develop new ones for the district.

Group scores for community members, students, teachers, and administrators are calculated and compared. An analysis of the variance indicates the magnitude of agreement or disagreement on each goal. Those goals which exhibit a high degree of disagreement may cause more controversy if implemented than those on which there is more agreement.

Since the rating of the goals reflects the individual's perception of how well they are being met, it is possible for a goal to be rated poorly when in fact standardized test scores or other data reveal an exemplary job is being done. In such a case, the need is to communicate the extent of goal achievement to the community.

HOW ARE GOALS AND NEEDS CONVERTED INTO PROGRAMS AND POLICIES?

At this point in the process the district has ranked goals in priority order and identified those goals which are not being met as well as others. The PDK model includes a programmed course for the writing of performance objectives. Teachers and other professional staff are trained to write performance objectives for current programs of instruction related to the goals. These performance objectives identify what the learner is to do, how it is to be done and how well the learner is to perform. A set of program objectives is then developed for current programs.

HOW IS EVALUATION ACCOMPLISHED?

Since each performance objective states how the desired learner outcome will be measured, evaluation of learner progress is facilitated. If learners are not meeting the objective, either the methods and media used should be analyzed, or the level of performance specified should be re-examined and lowered if found to have been set too high originally.

WHAT ARE THE IMPLEMENTATION FACTORS?

PDK conducts one day workshops which familiarize the participants with the model. During the workshop participants are trained to organize and conduct the two community meetings, to analyze the data gathered from the community, teachers and students, and to translate the priority needs into performance objectives. PDK also distributes a kit which contains do-it-yourself manuals explaining the various phases of the PDK process, and materials used for the goal ranking and needs assessment meetings.

Although the PDK kit contains all the directions and materials needed to implement the process, the orientation and trail run provided by the PDK workshop are very useful. After one or two representatives of the district are trained, they will be able to train others. No further consultants are needed.

The community meetings each take about three hours of working time to complete.

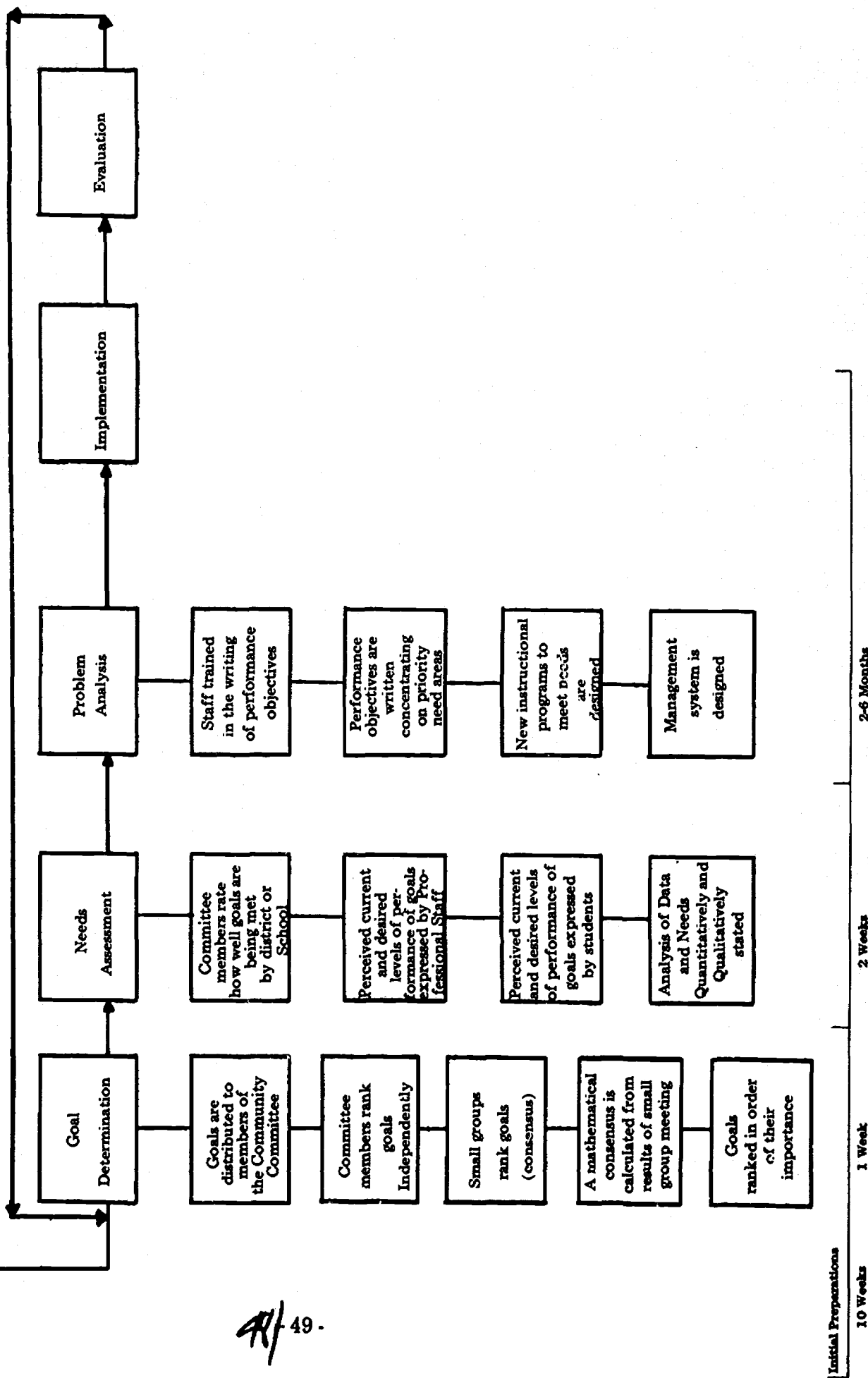
Materials available are:

1.	A kit for 60 community members	\$60.00
2.	A replacement kit	28.00
3.	A training packet which has sample pieces from the community kit	3.00
4.	<u>A Programmed Course for the Writing of Performance Objectives</u>	1.00
5.	<u>Writing Performance Objective-Instructor's Manual for Teachers and Administrators</u>	1.00

For further information and materials, contact:

Phi Delta Kappa, Inc.
Eighth and Union
Box 789
Bloomington, Indiana 47401

49.



Goals

[illegible]

D. WORLDWIDE PLANNING MODEL

WHO IS INVOLVED?

A commitment from the Board of Education is needed to begin a needs assessment. Once the commitment is made, a committee is formed to manage and carry out the needs assessment. The committee should represent a cross section of the educational community. The needs assessment activities will also involve input from all groups in the district. (See Figure I).

IS GOAL DETERMINATION THE FIRST FORMAL STEP IN THE PROCESS?

No. Goals are set after the needs have been determined.

HOW ARE NEEDS ASSESSED?

1. Conduct Survey of Opinions - This is done to measure the level of public understanding; it reveals needs and aspirations as well as ignorance and misinformation within the community. Teachers, students, parents, community members and administrative staff should be included in the survey.
2. Gather existing data, conduct tests and measurements for new data and summarize tests and measurements These measurements provide a way to assess pupil learning. The measurements should include the areas of cognitive, affective and psychomotor learning.
3. Conduct Community Concerns Conference - This is an organized attempt to identify the problems perceived by the community. It is a way to systematically tap the ideas and reactions of the community.
4. Conduct Speak-Ups . These forums organize groups of students and school personnel and encourage them to present their perceptions of educational needs. It is a systematic way to gather student, staff, parent, or other group reactions and recommendations.
5. Summarize Administrative Data and Evaluation - This activity gathers relevant facts, findings and generalizations through research, administrative data and survey information. The facts and trends included should be based on the goals and objectives stated at the beginning. The things reported should be simple and clear, for easy comprehension by the lay community.

Once all the data is collected a committee is set up to organize and classify the concerns elicited by the activities. These concerns are documented with facts and policies. (See Figure II.) They are then stated in terms of learner needs, ranked and published.

HOW ARE GOALS DETERMINED?

The need statements are converted into goal statements.

HOW ARE GOALS AND NEEDS CONVERTED INTO PROGRAMS AND POLICIES?

1. Identify the Problem - The problem is identified as a result of the needs assessment procedure. The relevant facts, values, and policies relating to an expressed concern are the basis for the validation of the concern as a problem.
2. Define Problem - There are eight steps involved in defining the problem: (a) restate the need in question form, (b) formulate a mission statement, (c) define performance requirements, (d) define constraints, (e) identify storing methods and means, (f) summarize mission objectives, (g) identify enabling policies, (h) apply problem definition criteria.
3. Analyze Problem - This step involves breaking a problem into its component parts or functions and showing the logical relationship among the parts.
4. Generate Alternative Solutions - A systematic consideration is made of several alternative solutions.
5. Select the "Best" Alternative - In this step, the best solution is selected in terms of time required to implement, cost of implementation, and estimate benefited of effectiveness;
6. Plan Implementation of Solution - This step involves a delineation of activity elements, schedule of events and resource requirements.

HOW IS EVALUATION ACCOMPLISHED?

Evaluation should be built into every phase of the planning process.

WHAT ARE THE IMPLEMENTATION FACTORS?

Worldwide has developed a series of manuals, describing in full detail each of the steps outlined in this handbook. They also have a source book which provides examples of letters, polling forms, surveys, interviews, questions, etc. There is also a handbook describing in detail the steps to be taken after the needs assessment has been completed. These manuals are clear and easy to understand. They provide all the necessary descriptive steps to do a needs assessment and subsequent planning steps.

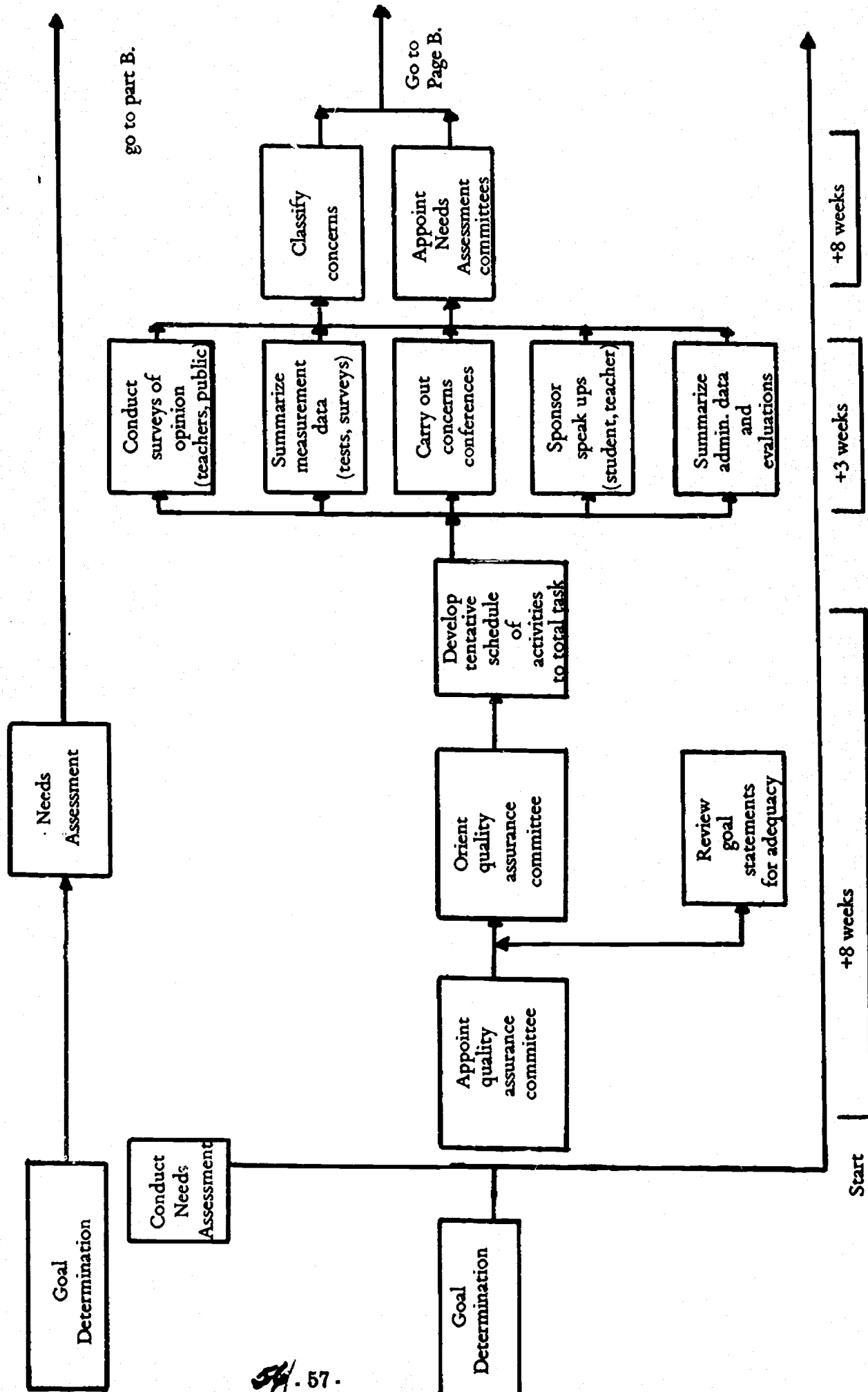
Worldwide also conducts a two day workshop for those interested in doing a needs assessment. They train participants to write need statements, surveys and, questionnaires.

The cost for the manuals needed to carry out the needs assessment phase of the Worldwide model is \$37.00. A film strip of the process is \$60.00. A Worldwide consultant will conduct training workshops for about \$2,000. This includes materials for 20-25 participants and three days of training.

For further information, materials and cost estimates, write:

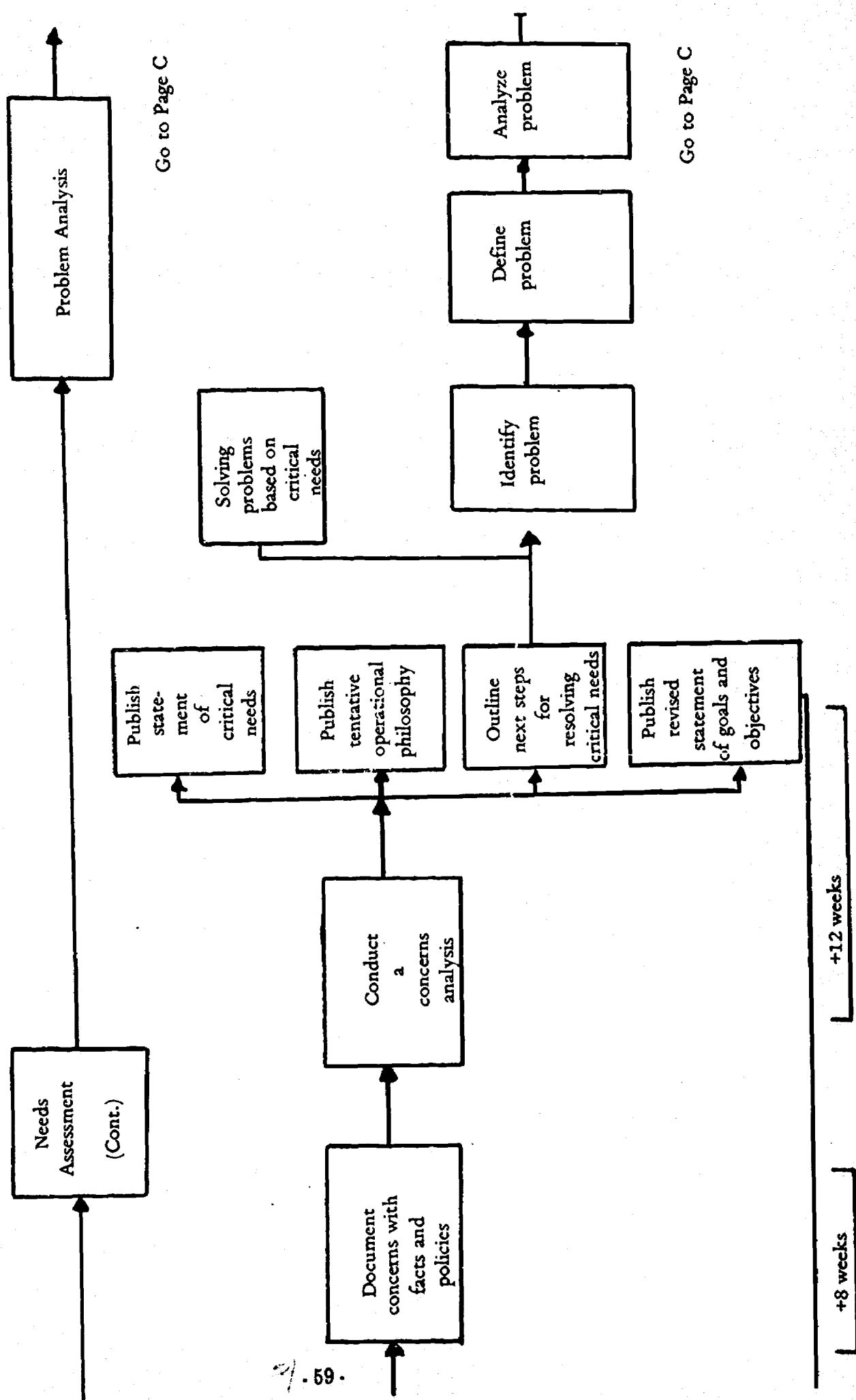
Worldwide Education and Research Institute
2315 Stringham Avenue
Salt Lake City, Utah 84108

or call: Jefferson N. Eastmond (801) 521-9393



WORLDWIDE PLANNING MODEL: PLAN-ACTIVITY DIAGRAM

Page B



WORLDWIDE PLANNING MODEL: PLAN-ACTIVITY DIAGRAM

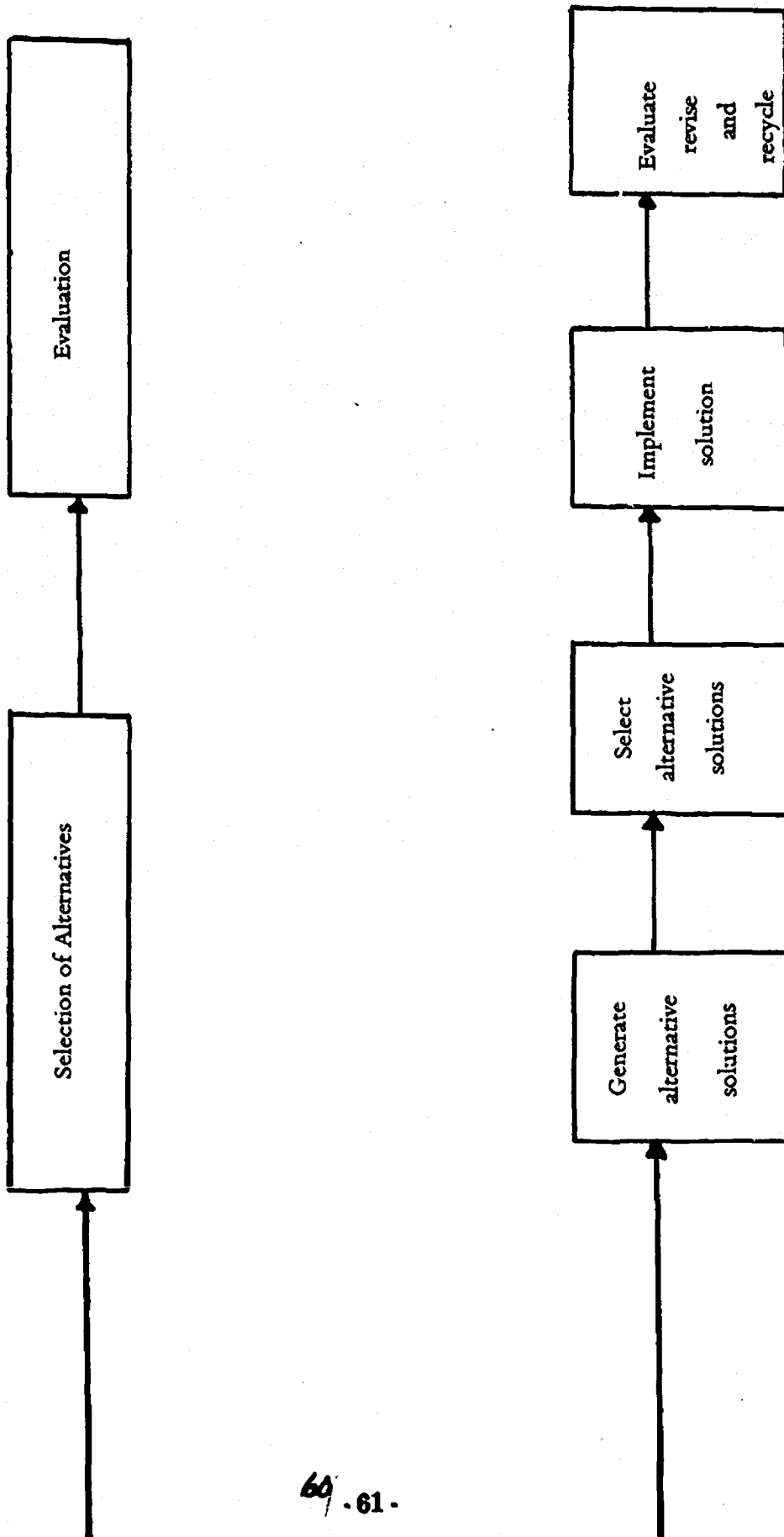


Figure I
Worldwide Planning Model

NEEDS ASSESSMENT REPORT FORM

NAME OF COMMUNITY _____ GROUP LEADER _____ DATE _____

TASK COMPLETED	APPROVED BY COMMITTEE CHAIRMAN	APPROVED BY TRAINING DIRECTOR
PHASE I: ACTUAL PLANNING		
1.0 Draft of Letter of Invitation		
Letter of Appointment to Director		
2.0 Define Duties of Steering Committee		
Define Duties of Director		
3.0 Copy of Goals and Objectives		
4.0 Schedule of Activities with Man-Days		
5.0 Population(s) to be polled (Public, Teacher, Pupil, etc.)		
Size of Sample(s)		
Nature of Cross Section		
Procedure(s) to be Used		
Draft of Polling Instruction (at least 30 questions)		
6.0 Specify Test Data to be Used		
Cognitive		
Non-cognitive		
7.0 Date and Place of Concerns		
Detail format of Conference		
8.0 Dates, Participants and Ground Rules		
9.0 Specify 4 categories of data to examine		
PHASE II: WORKING WITH SIMULATED DATA		
10.0 Each Participant Selects one Learner Need		
11.0 Complete Grid: Type of Position-via-Control Factors (sex, age, etc.)		
12.0 Each Participant Documents at least one Concern with assigned facts from 5 Sources (Box 5.0-9.0)		
13.0 Conduct a Concerns Analysis for each Concern Documented (Rotate as Expediter)		
14.0 Format Publication of Critical Needs		
15.0 Rearrange all Values into Philosophy Format		
16.0 Flowchart of Next Steps in Resolving Needs		
17.0 Each Participant Translates one Validated Need into		
A. A Goal Statement		
B. Statement of Objectives		
18.0 Each Participant Completes a Critique Form on the Training Session (Hand in)		

Figure II Worldwide Planning Model

CONCERN: School discipline is inadequate.

FACTS		POLICIES	VALUES																													
Student discipline (18) (#2:7) <table><tr><th rowspan="2"></th><th colspan="4">Teachers</th></tr><tr><th>Elem.</th><th>Jr.</th><th>Sr.</th><th>Adminis.</th></tr><tr><td>Very good</td><td>15%</td><td>11%</td><td>9%</td><td>15%</td></tr><tr><td>Adequate</td><td>53%</td><td>51%</td><td>45%</td><td>14%</td></tr><tr><td>Inadequate</td><td>32%</td><td>37%</td><td>45%</td><td>14%</td></tr><tr><td>No response</td><td>1%</td><td>1%</td><td>2%</td><td>2%</td></tr></table> According to local businessmen and employers, the discipline in the schools is (36) (#3:15) Very strict 5% About right 56% Not strict enough 30% No response 9% State Office Survey of Classroom Discipline in SLC Schools (#9:35-36) <u>Procedure.</u> A survey instrument was designed to determine if discipline is a problem. Fifty-six elementary teachers, thirty-six secondary teachers, twelve secondary principals, and eight elementary principals responded to it. In addition, a member of the State School Office Task Force on Instruction observed for one hour in each of twenty classrooms to determine the commitment of students to the learning task. They also interviewed five students in each of these classes to determine if students knew the purpose of the activity in which they were engaged. <u>Findings:</u> It was found that: 1. 42% of the teachers felt that discipline was not a problem and 58% felt that it was. 2. That teachers do not have a clear definition or concept of what discipline is. 3. That teachers felt that students usually or always respond positively to instruction.			Teachers				Elem.	Jr.	Sr.	Adminis.	Very good	15%	11%	9%	15%	Adequate	53%	51%	45%	14%	Inadequate	32%	37%	45%	14%	No response	1%	1%	2%	2%		Need uniform behavioral goals Need a study of students we lose each year because of discipline Students display "You can't do anything to me" attitude Teachers and administrators too timid to demand proper behavior
	Teachers																															
	Elem.	Jr.	Sr.	Adminis.																												
Very good	15%	11%	9%	15%																												
Adequate	53%	51%	45%	14%																												
Inadequate	32%	37%	45%	14%																												
No response	1%	1%	2%	2%																												
VALIDATED NEED:			CIRCLE ONE: 1. Extremely critical 2. Very critical																													

A PPENDICES

A. DEFINITIONS

DALLAS

Gap - a discrepancy between "what is" and "what should be", a need.

Operation Involvement - a 600 member committee of students, parents, teachers, principals, central office staff and other school employees that assists the Board of Education in assessing needs, assigning priorities and allocating resources as a part of the annual budgeting process.

FRESNO

Assessment - the act of gathering data, pooling information, and making comparisons.

Evaluation - the act of making judgments based upon the data gathered.

Goal Indicator - an occurrence or state of being that would be in effect should a goal be met. A fact or factor that will illustrate or amplify the goal statement.

Objective - a desired accomplishment which can be measured within a given time and which, if achieved, will advance the system toward a goal.

PHI DELTA KAPPA

Community - All those individuals within the geographic boundaries of a particular school attendance area or school district who will be affected by the educational processes taking place therein.

Goal - a statement of board direction, general purpose or intent. A goal is general and timeless and is not concerned with a particular achievement within a specified time.

Need - the difference between "what is" and "what should be." All institutional needs must be related to learner needs. Needs should be related to a problem rather than a solution.

Needs Assessment - a systematic approach to identifying the discrepancy between "what is" and "what should be."

Performance Objective - a clear precise statement of what the learner is to do to demonstrate competency at the end of a prescribed learning period. It describes how the learner is to demonstrate his/her competency and how well the learner is to perform in order to demonstrate that competency.

WORLDWIDE

Concern - the unrefined, unevaluated expressions that emanate from individuals or organizations in their attempts to identify needs or problems.

Concerns Analysis - the process of identifying all relevant facts, values, and policies related to a given concern; a technique used in problem identification.

Goal - a board direction, general purpose or intent. It is general and timeless and is not concerned with a particular achievement within a specified period of time.

Need - a discrepancy or differential between "what is" and "what should be." In educational planning, "need" refers to problems rather than solutions.

Objectives - a quantifiable desired output within a time and space framework. By achieving the objectives, progress toward the goal is advanced. In this model (Worldwide) "objectives" are measurable learner behaviors.

Operational Philosophy - an accumulation of identified values that are used as a kind of "guidance mechanism" in the problem-solving approach. It is an organized arrangement of all of the values generated through the concerns analysis procedures.

Performance Requirements - a series of criteria or standards by which the success or failure of the system or mission is to be ascertained. Normally, these are comprised of products, specifications, performance characteristics and restrictions; and they allow measurements to determine how well the system is performing with respect to the goal.

Problem - a problem exists when there is a goal to be attained with no well-defined or well-established way of attaining it or when the goal is so vaguely defined or unclear that relevant means for attaining it cannot be clearly determined.

Problem Identification - a part of the needs assessment procedure which identifies relevant facts, values, and policies related to an expressed concern and then validates the concern as a problem in terms of accuracy, validity, feasibility, criticality.

B. NEEDS ASSESSMENT EVALUATION QUESTIONS

When conducting a needs assessment, evaluation is an on-going part of the program. From the first planning steps of the project, consideration is given to what is to be accomplished. When stating the goals of the needs assessment project, criteria indicating the achievement of the goals should also be included. At the end of the project these criteria will indicate the degree to which you have accomplished your goals.

To help in evaluating your needs assessment project, we are including a list of questions that could be considered when planning your needs assessment program. They have been placed into six categories:

1. Product - the identified needs.
2. Process - the method for determining the needs and the method for validating them.
3. Management - those who manage the needs assessment project, and the goals of the management team (i.e. setting up committees, orienting people, etc.)
4. Participation - method of choosing representatives from the community and various other groups. How are they involved? What are they to accomplish?
5. Communications - understand goals of the project. Did the participants understand their role in the project?

EVALUATION QUESTIONS

Product

1. Were critical learner needs identified?
2. Were characteristics of the learners with the needs (target population) identified?
3. Were the needs useful in short-range or long-range planning efforts?
4. Were the needs applicable for consideration in budget preparation and allocation of resources such as staff, time, materials?

Process

1. Was the process for determining needs clear to the participants?
2. Would additional training have expedited the implementation of the process?
3. Were goals and needs ranked from most important to least important?
4. Did participants and management team feel the procedure for analyzing the data was satisfactory?
5. Was the collected data inclusive enough for identifying the needs?
6. Was the method for validating the identified needs satisfactory to the participants?
7. Were the methods for collecting data satisfactory to participants? To those providing the information?

Participation

1. Was the method for selecting participants fair?
2. Were the groups actively involved (i. e. attend meetings, receive and return surveys and participate on committees?)
3. Were the participants able to express their views openly and completely?
4. Could significant minority opinion be identified and presented along with the majority views?

Management

1. Was the top administration committed to the process?
2. Was the top administration committed to resolving the identified needs?
3. Were the lines of responsibility for implementing the process clearly established?
4. Did the managers of the needs assessment project receive the necessary information and skills for conducting the needs assessment?

Communication

1. Did everyone (teachers, administration, students, community) understand the purpose of the needs assessment process?
2. Did they understand the goals of the needs assessment?
3. Were they informed as to how they could participate?
4. Did they evaluate and give feedback on their participation in the project?
5. Were they notified of the results of the goal determination and needs assessment phases?
6. Were the results of the goal development and needs assessment made public?

Budget

1. Was the amount of money allocated sufficient?
2. Was there enough money to collect the necessary data?
3. Was the amount of time and money expended worth the results?

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Source: A Resource Handbook for Promoting Community Involvement in Educational Goal Determination, "Our Schools" Project, Department of Education, 225 West State Street, Trenton, New Jersey 08025.

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Boroun, Frederich Gramm, Measurement and Evaluation, Itasca, Illinois, F.E. Peacock Publishers, 1971.

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MODELS

Center for the Study of Evaluation. Elementary School Evaluation Kit. An Authoritative and carefully field tested KIT to help the Principal, Superintendent and Curriculum Director answer two vital questions: (1) "What are my school-priority needs?" and (2) "How can I best allocate my School resources to meet their needs?" Obtainable at \$80.00 from: Allyn and Bacon, Inc., Langwood Division, Boston, Mass. 02210.

Educational Goals and Objectives. A Model Program for Community and Professional Involvement. U.S.O.E. III ESEA P.L. 89-10, Sec. 306. Northern California Program Development Center, Chico State College, Chico, California. Dr. B. Keith Rise, Director.

Evaluation Workshop II: Needs Assessment/Preliminary Version CTB/McGraw-Hill, Del Monte Research Park, Monterey, California 93940, Tel. 408/373-2932.

Fresno County Department of Education, 2314 Mariposa Street, Fresno, California, 93721, Cost \$12.00 for materials on Fresno planning model.

Inter active Education, Inc., In-Service Education, 123 Sylvan Ave., Englewood Cliffs, New Jersey 07623. Anne Wennhold, Director; 201-947-0458. Has workshops responding to the need to "know more" about needs assessment. The program is concerned with an approach to developing a needs assessment program for your school.

Phi Delta Kappa, Inc., Eighth and Union, Box 789, Bloomington, Indiana 47401. Kit \$28.00.

Sharing Decisions-Dallas Style: An Overview of Dallas Model for Shared-Decision Making, Dallas Independent School District, Communications and Community Relations Department, 3700 Ross Avenue, Dallas, Texas 75204, 1973.

Worldwide Education and Research Institute, 2315 Stringham Avenue, Salt Lake City, Utah 84109, 801-521-9393.

EVALUATION OF NEEDS ASSESSMENT PLANNING HANDBOOK

1. Please rate the following sections of the handbook according to the scale below:

- 1 = poor
2 = OK
3 = very good

	<u>Clarity</u>	<u>Usefulness</u>
a. Comprehensive planning	_____	_____
b. General steps in a planning process	_____	_____
c. Generic planning model	_____	_____
d. Why do comprehensive planning?	_____	_____
e. What is a needs assessment?	_____	_____
f. Why do a needs assessment?	_____	_____
g. How to begin a needs assessment	_____	_____
h. Matrix of model characteristics	_____	_____
i. Dallas planning model	_____	_____
j. Fresno planning model	_____	_____
k. Phi Delta Kappa planning model	_____	_____
l. Worldwide planning model	_____	_____
m. Definitions	_____	_____
n. Needs assessment evaluation questions	_____	_____

2. Were you satisfied with the variety of models included in the handbook?

_____ yes

_____ no: if not, why? _____

3. If you were to do a needs assessment, which model would you prefer?

_____ Dallas

_____ Fresno

_____ PDK

_____ Worldwide

_____ Other: Explain _____

4. In what way(s) has this handbook been helpful to you?

_____ as an overall orientation to planning and needs assessment

_____ as a practical guide to conducting a needs assessment

_____ as a resource for obtaining further information on needs assessment

_____ other: explain _____

5. In what way could the handbook have been more helpful? _____

6. What follow-up services would you like to see provided in conjunction with the handbook?

_____ workshops

_____ list of services available: _____ SEA

_____ LEA

_____ academic

_____ private

_____ information on planning in other districts

_____ references on specific measurements and tests

_____ technical assistance on collecting and analyzing data.

- i. Dallas planning model _____
j. Fresno planning model _____
k. Phi Delta Kappa planning model _____
l. Worldwide planning model _____
m. Definitions _____
n. Needs assessment evaluation questions _____

2. Were you satisfied with the variety of models included in the handbook?

_____ yes
_____ no: if not, why? _____

3. If you were to do a needs assessment, which model would you prefer?

_____ Dallas
_____ Fresno
_____ PDK
_____ Worldwide
_____ Other: Explain _____

4. In what way(s) has this handbook been helpful to you?

_____ as an overall orientation to planning and needs assessment
_____ as a practical guide to conducting a needs assessment
_____ as a resource for obtaining further information on needs assessment
_____ other: explain _____

5. In what way could the handbook have been more helpful? _____

6. What follow-up services would you like to see provided in conjunction with the handbook?

_____ workshops
_____ list of services available: _____ SEA
_____ LEA
_____ academic
_____ private
_____ information on planning in other districts
_____ references on specific measurements and tests
_____ technical assistance on collecting and analyzing data
_____ technical assistance in writing tests and questionnaires and conducting surveys
_____ more extensive bibliography on needs assessment

7. If a workshop on needs assessment is conducted, what specific areas would you like to see covered?

_____ orientation to planning and needs assessment
_____ how to manage a needs assessment
_____ technical skills for collecting data
_____ technical skills in analyzing data
_____ how to organize and use community participation effectively

8. What would be the best time for such a workshop?

9. Would you like to see handbooks explaining other areas of planning?

☐ no

☐ yes: if yes, which areas? ☐ problem definition, analysis and solving
☐ generation and selection of alternatives
☐ implementation
☐ evaluation
☐ management of planning

10. Where would you like to see the emphasis in these handbooks?

☐ how to manage the planning phase
☐ how to do each step
☐ description of the planning phase

When evaluation is completed, fold sheet crosswise along dotted lines into thirds so that address is on the outside. Tape or staple closed and mail.

Stamp

Jean Pundlak
Room 532
Bureau of Planning
Department of Education
225 West State Street
Trenton, New Jersey 08625

MANAGING A NEEDS ASSESSMENT

Cook, Desmond, L. Educational Project Management, Columbus Ohio: Charles E. Merrill Publishing Company, 1971.

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Management System. Needs Assessment Program Worksheets and Handouts EIC South Woodbury-Glassboro Road, Pittman, New Jersey 08071. John Rady (609) 589-3410. Provides step-by-step instructions for carrying out a needs assessment. Includes worksheets for projection and handouts.

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The activity which is the subject of this report was supported in whole or in part by the U.S. Office of Education, Department of Health, Education, and Welfare. However, the opinions expressed herein do not necessarily reflect the position or policy of the U.S. Office of Education, and no official endorsement by the U.S. Office of Education should be inferred.